



ISPAE

Volume: Oct-2025

MONTHLY REPORT ON
AGRI-PRODUCT EXPORT

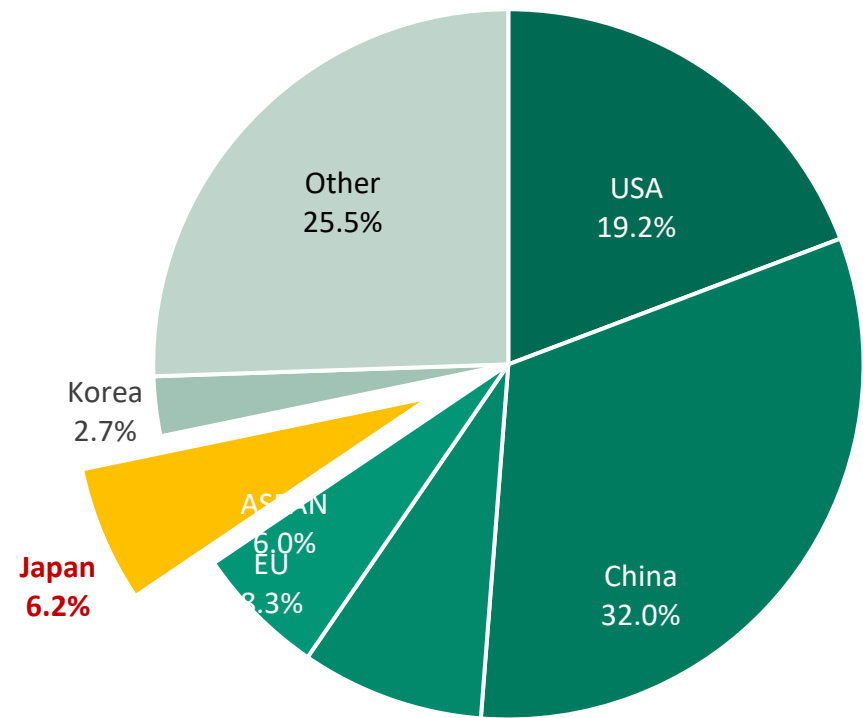
FROM VIETNAM TO JAPAN MARKET

Prepared by: **AGREINFOS**



THE SITUATION OF AGRO-FORESTRY-FISHERY (AFF) PRODUCT EXPORT FROM VIET NAM TO JAPAN IN SEPTEMBER 2025

Share of AFF product export to Japan in Sep-2025



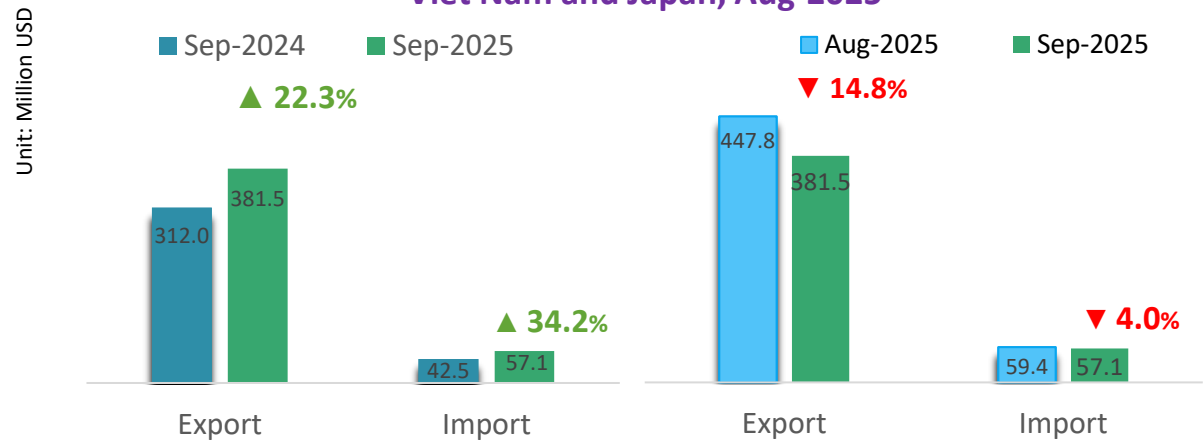
Changes in the share of AFF product export to Japan in Sep-2025 compared to Aug-2025 and Sep-2024

Market	Export value (million USD)	Compared to Aug-2025	Compared to Sep-2024
USA	1,185	▼ 0.01%	▼ 1.9%
China	1,971	▲ 5.9%	▲ 5.1%
EU	513	▼ 0.02%	▲ 1.9%
ASEAN	369	▼ 3.2%	▼ 5.7%
Japan	382	▼ 1.0%	▲ 0.4%
Korea	167	▼ 0.4%	▼ 0.2%
Total export	6,159		

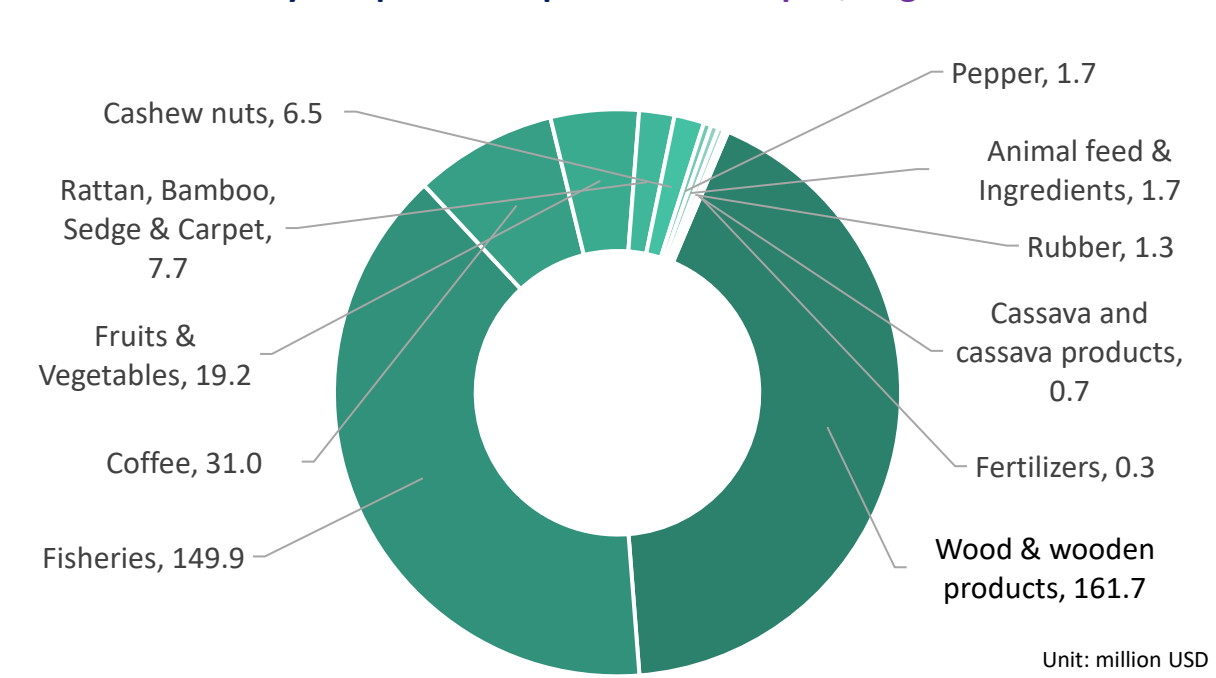
Source: Calculated from data of the Department of Customs

THE SITUATION OF AGRO-FORESTRY-FISHERY (AFF) PRODUCT EXPORT FROM VIET NAM TO JAPAN IN SEPTEMBER 2025

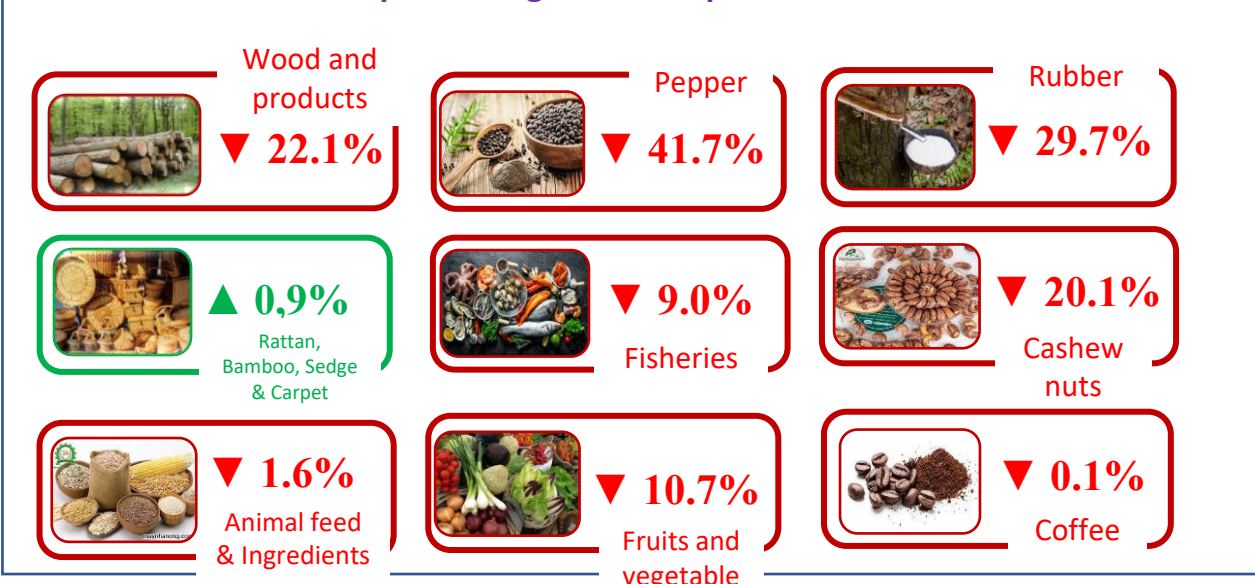
AFF product import-export value between Viet Nam and Japan, Aug-2025



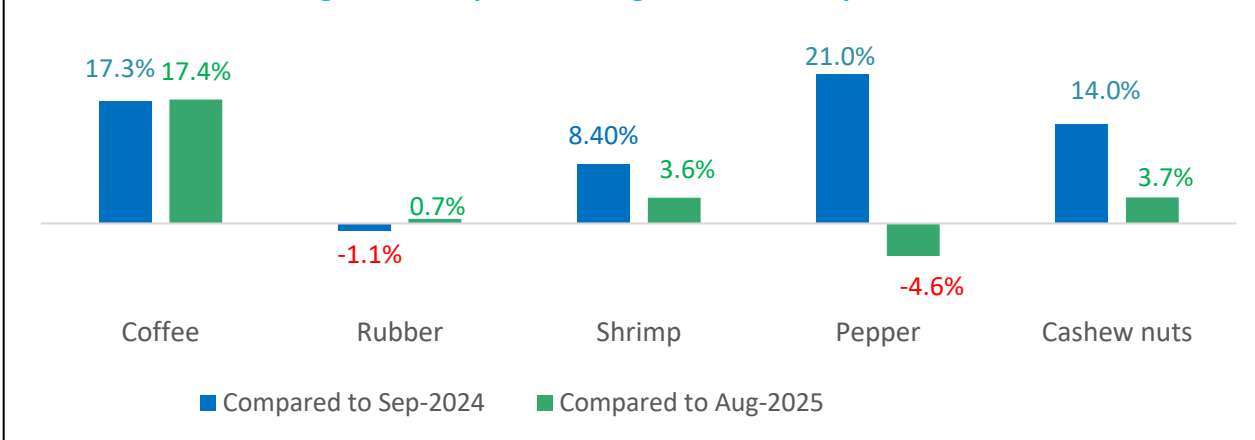
Key AFF product export value to Japan, Aug-2025



Changes in key AFF product export value to Japan in Aug-2025 compared to Jul-2025



Changes in average export value of key AFF products to the Japan, Aug-2025 compared to Aug-2024 and compared to Jul-2025



Source: Calculated from data of the Department of Customs

Japan has the first female Prime Minister in its history

On October 21, Takaichi Sanae officially became Japan's 104th Prime Minister and the first female Prime Minister.

Ms. Takaichi, 64, is firstly elected to the House of Representatives in 1993 and has held key positions in the government and in the Liberal Democratic Party such as minister of economic security, minister of the interior and

communications, and chairman of the LDP's policy research council.

A day before the vote in the House of Representatives, Takaichi pledged to "make the country's economy stronger and reshape Japan into a country that can shoulder the responsibilities of future generations."



Source: vnexpress.net

Japan's economy slows as U.S. tariffs put pressure on exports

Japan's GDP in the third quarter of 2025 fell by 2.4% compared to the previous quarter, the first decline after six quarters of growth, as U.S. tariffs sharply reduced exports and slowed investment and consumption.

Exports is the key factor leading to this decline, down 2.3% from the previous quarter. Some predicted a sharp decline due

to massive exports before U.S. President Donald Trump imposed tariffs.

The expansionary fiscal policy of the government led by Prime Minister Sanae Takaichi, combined with the Bank of Japan (BOJ) continuing to maintain loose monetary policy, may cause the yen to continue to weaken in the near term.

At the same time, the economic measures and wage increase programs implemented by Prime Minister Takaichi's cabinet are expected

to create a driving force for economic growth, especially from 2026 onwards.



Source: vietnamplus.vn





WOOD AND WOOD PRODUCTS

Export value to Japan, Sep-2025



Export results to Japan, Sep-2025

VALUE



162

million USD

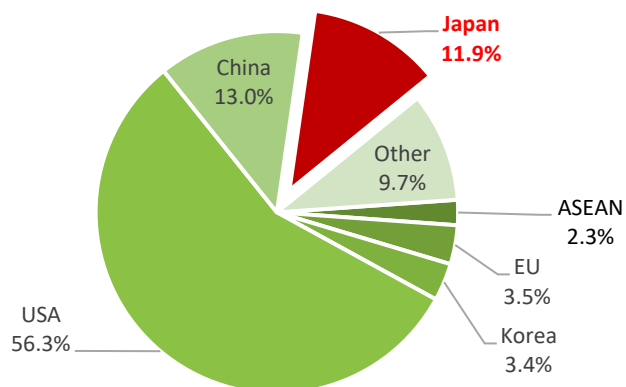
Decrease **22.1%** compared to Aug-2025

Increase **30.8%** compared to Sep-2024

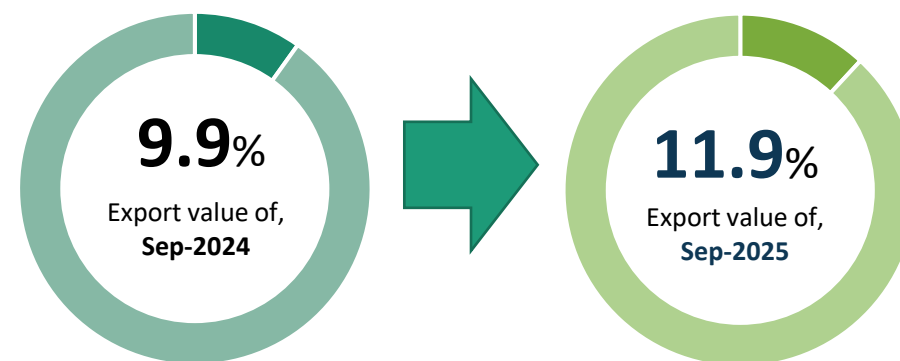
↑ **16.1 million USD** more than the monthly average rate in 2024

❖ Accumulated 9 months of 2025 reaches **1.6** billion USD, **89.8%** of total 2024

Percentage of export results to Japan, Sep-2025



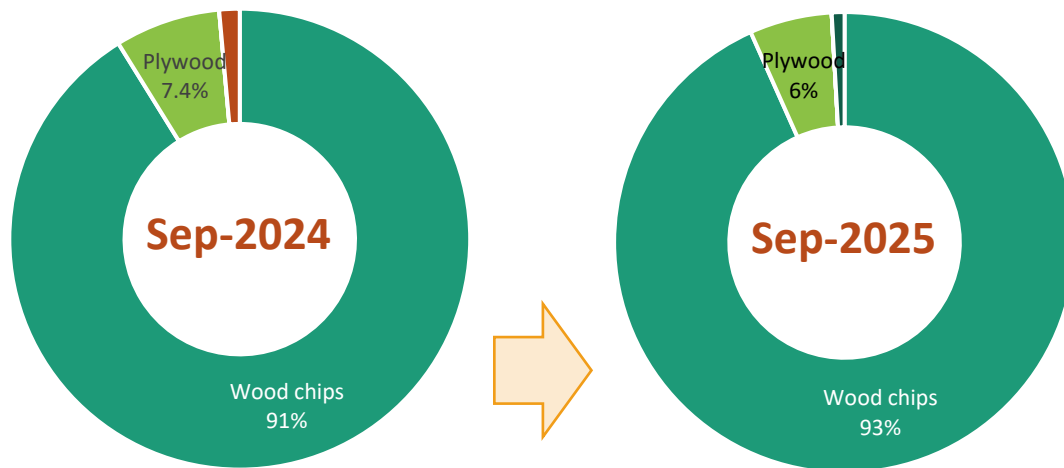
Changes in percentage of export results to Japan, Sep-2025





WOOD AND WOOD PRODUCTS

Structure of exports by products to Japan, Sep-2025



Export results to Japan, Sep-2025



Wood chips

Value: **109.7** million USD

Decrease **31%** compared to Aug-2025

Increase **51%** compared to Sep-2024



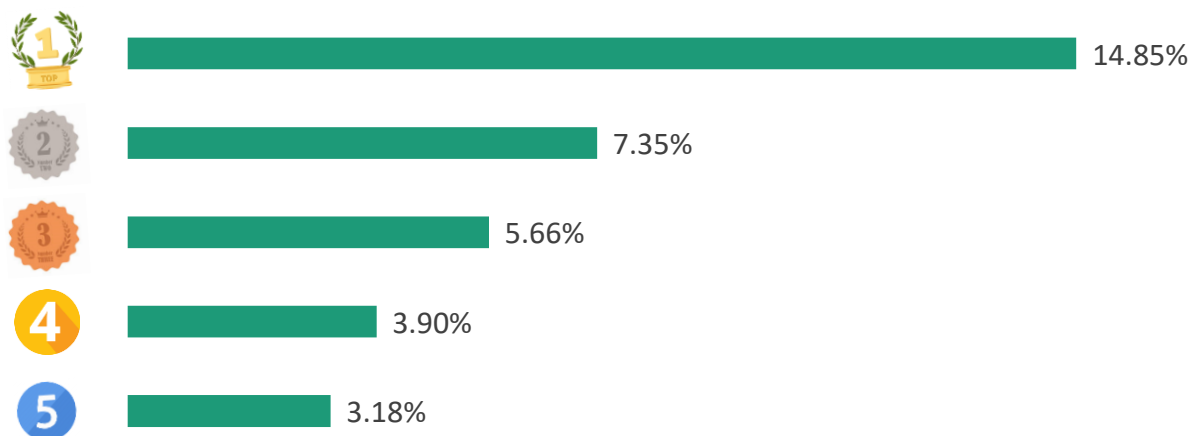
Plywood

Value: **6.8** million USD

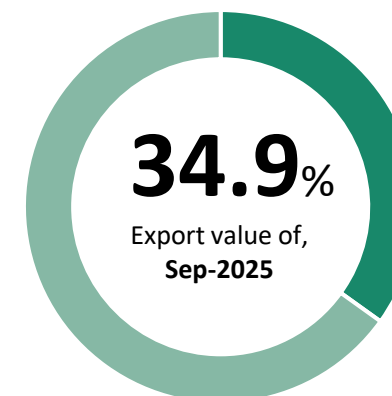
Decrease **11%** compared to Aug-2025

Increase **15%** compared to Sep-2024

TOP 5 export enterprises by value to Japan, Sep-2025



Value ratio of TOP 5 export enterprises to Japan, Sep-2025





The price of tropical plywood imported from Malaysia and Indonesia into Japan is increasing markedly, especially for 12mm film-coated plywood – currently reaching 600–610 USD/m³ (CIF) from Malaysia and 970 USD/m³ for thin Falcata from Indonesia. However, import demand in Japan is still low, buyers only order according to actual demand despite rising international prices and a weakening yen.

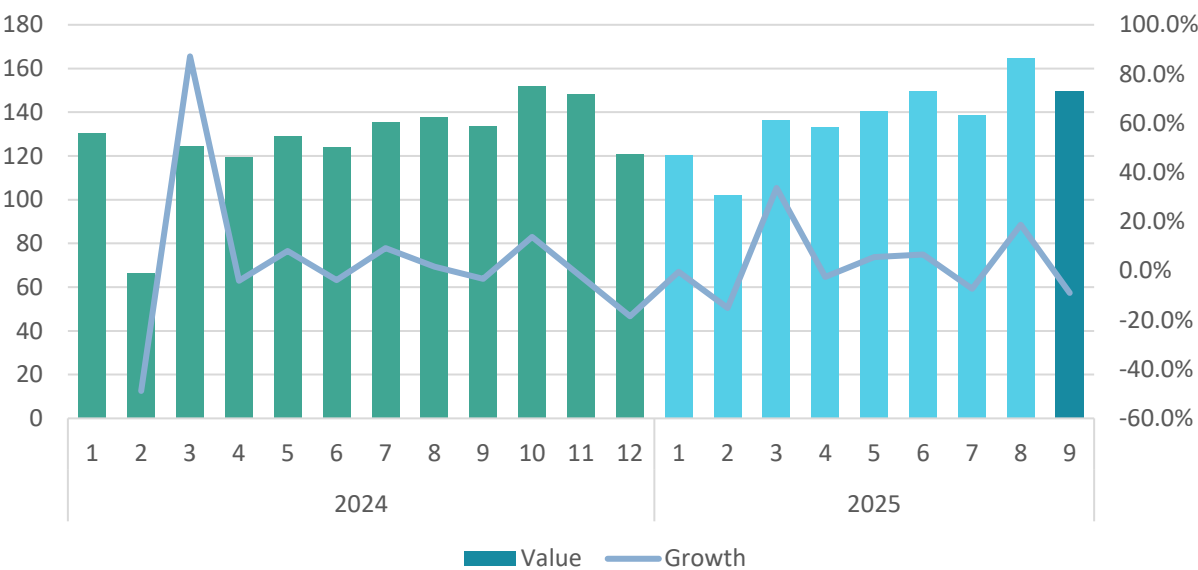
In Japan's domestic market, softwood plywood prices remained around 1,090–1,100 yen per sheet, reflecting the calm demand. Manufacturers are still trying to raise prices to improve profit margins, but consumption is not strong.

In addition to price movements, Japan is preparing to tighten JAS certification regulations for wood products after the JAS label abuse scandal. The new regulations will prohibit manual stamping and require the use of printing/tracing stamps, which are expected to be applied from next summer to increase transparency and quality control.

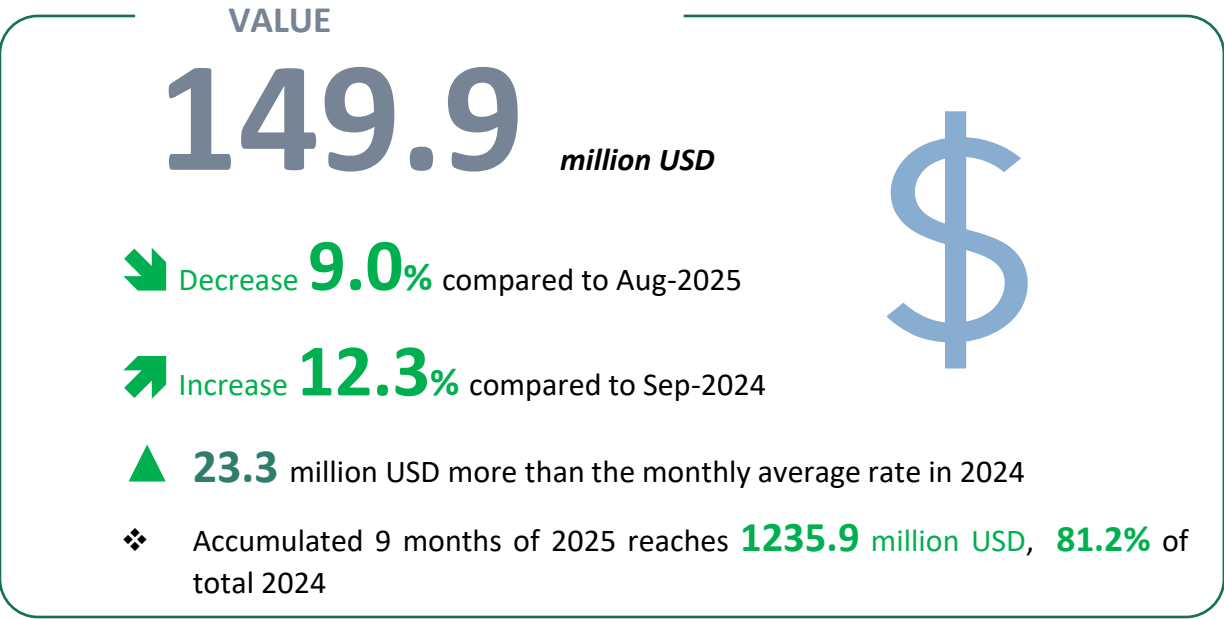


FISHERIES

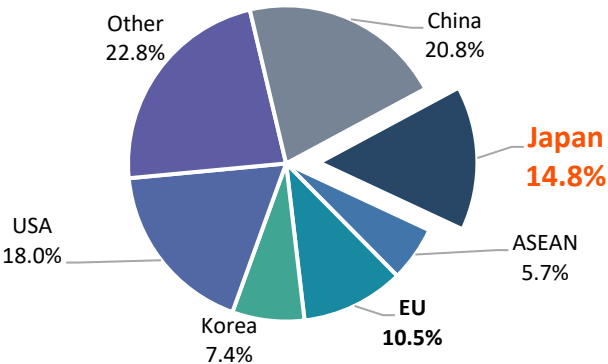
Export value to Japan, Sep-2025



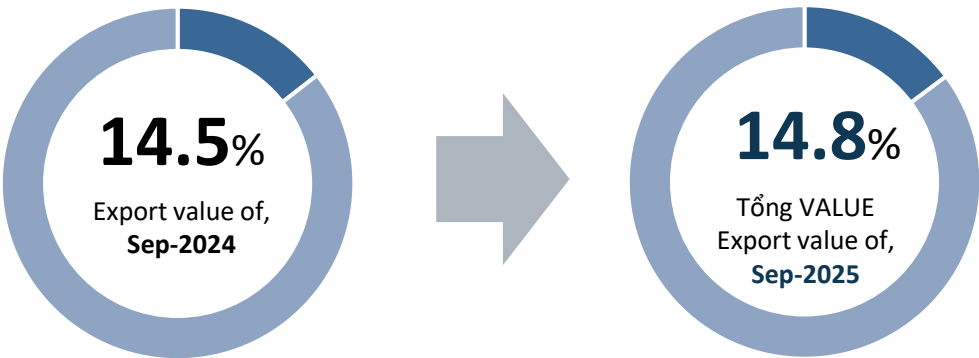
Export results to Japan, Sep-2025



Percentage of export results to Japan, Sep-2025



Changes in percentage of export results to Japan, Sep-2025

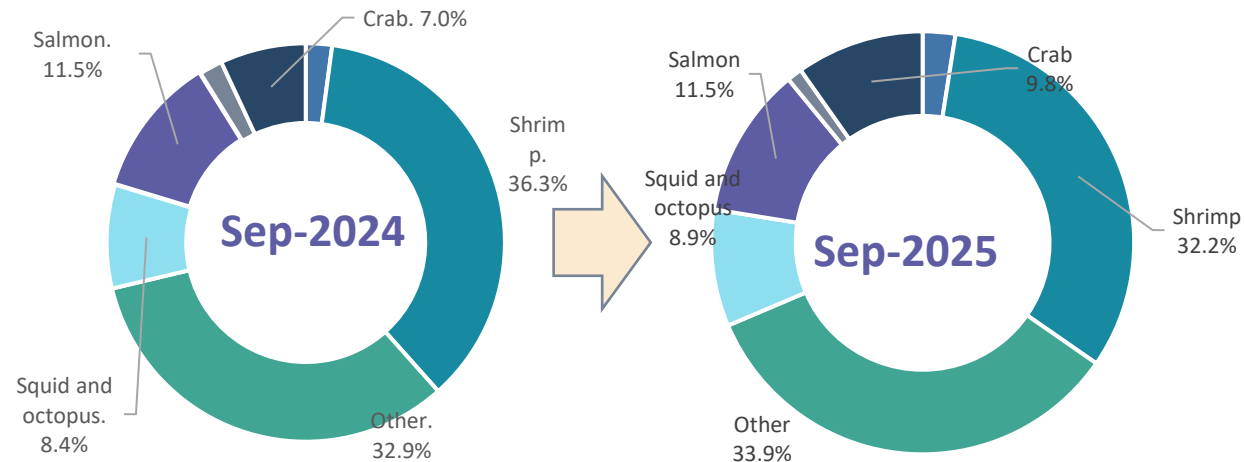


Source: Calculated from data of the General Department of Customs

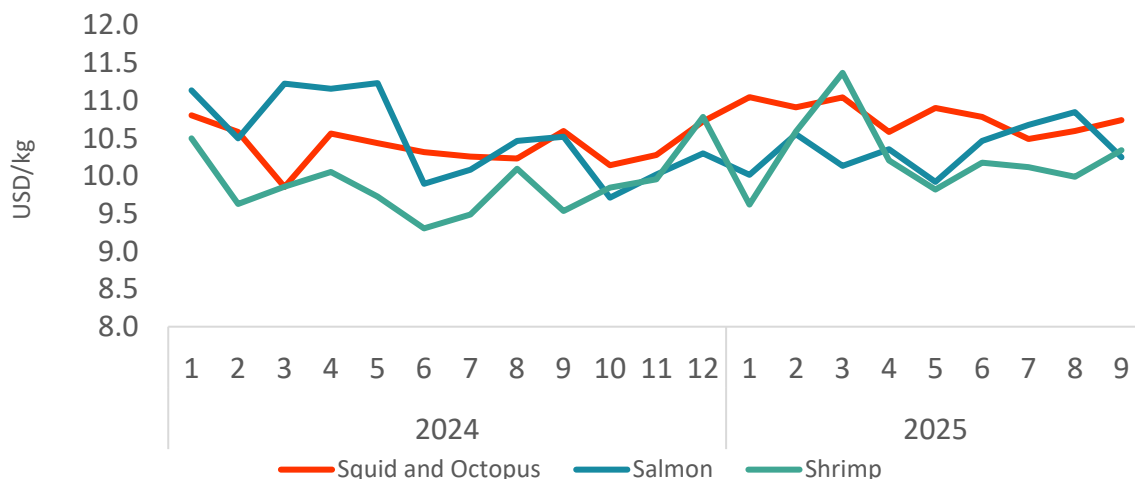


FISHERIES

Structure of exports by products to Japan, Sep-2025



Average export fisheries price to Japan, Sep-2025



Export results to Japan, Sep-2025



Salmon

Value: **17.3** million USD

Decrease **12.7%** compared to Aug-2025

Increase **12.9%** compared to Sep-2024



Shrimp

Value: **48.2** million USD

Decrease **12.3%** compared to Aug-2025

Decrease **0.4%** compared to Sep-2024



Squid and octopus

Value: **13.4** million USD

Decrease **17.2%** compared to Aug-2025

Increase **19.3%** compared to Sep-2024

Squid and Octopus

The average export price in Sep-2025 is **10.7** USD/kg; **increase 1.4%** compared to previous month; and **increase 1.4%** compared to the same month of 2024.

Salmon

The average export price in Sep-2025 is **10.2** USD/kg; **decrease 5.5%** compared to previous month; and **decrease 2.6%** compared to the same month of 2024.

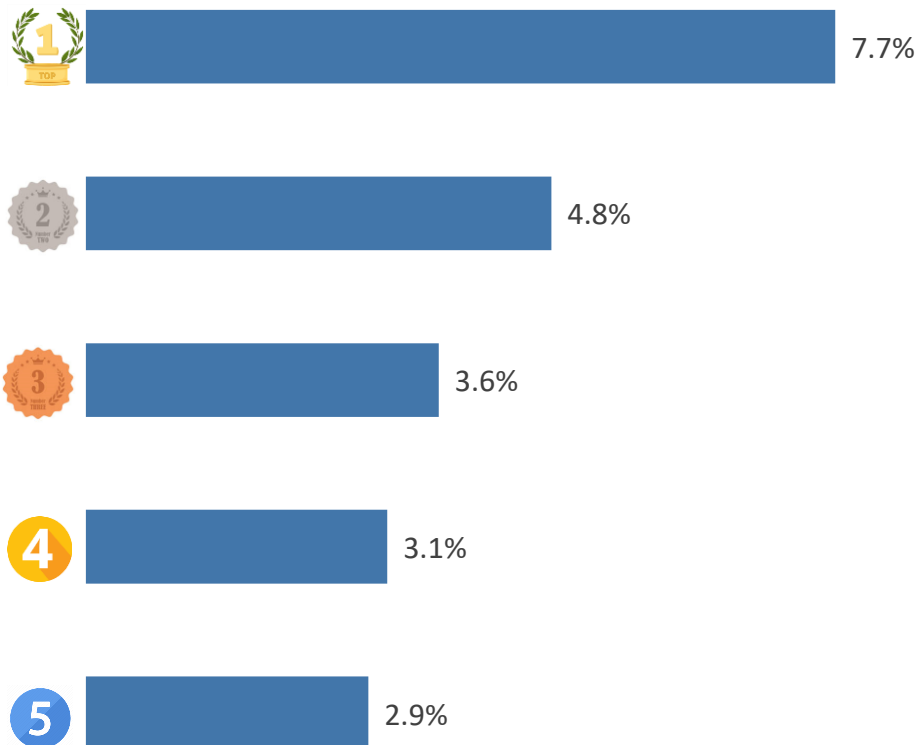
Shrimp

The average export price in Sep-2025 is **10.0** USD/kg; **increase 3.6%** compared to previous month; and **increase 8.0%** compared to the same month of 2024.

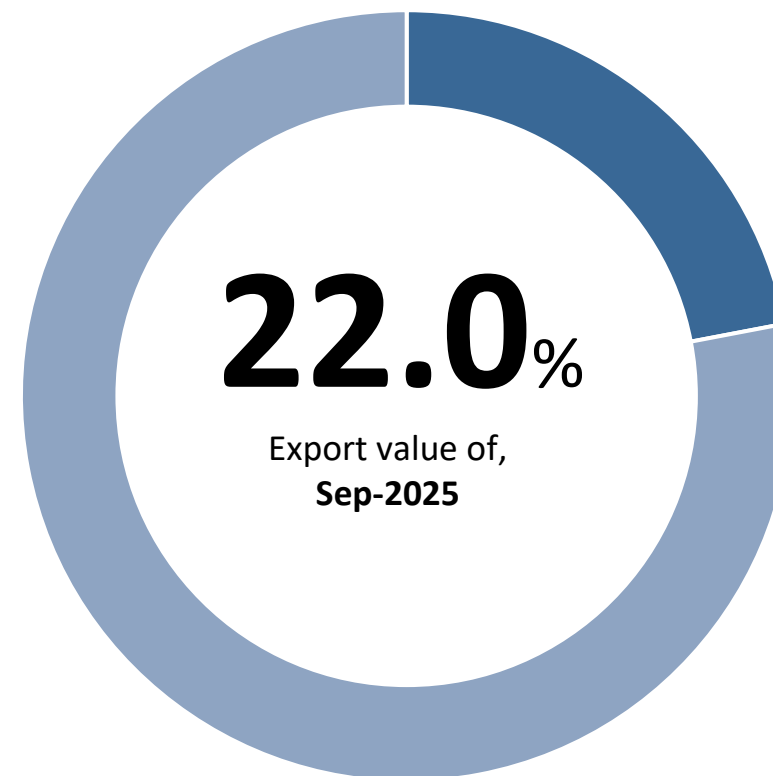


FISHERIES

TOP 5 export enterprises by value to Japan, Sep-2025



Value ratio of TOP 5 export enterprises to Japan, Sep-2025



Seafood consumption in Japan continues to decline due to economic pressures and habit change

Japan recorded a continuous downward trend in seafood consumption, posing a challenge for the seafood industry in 2025. According to the household survey, the average spending on seafood in July 2025 reached 5,553 yen (\$37.4), down 1% at nominal prices and 1.6% at real prices, marking the sixth consecutive month of decline.

The average volume of fresh seafood consumed was only 1.3 kg/household, down 0.6%. Many of the items that fell sharply saw a sharp decline in consumption volumes such as scallops (-54%), crabs (-44%), shrimp (-14%) and salted salmon (-16.9%), although spending on some products increased due to higher prices. In contrast, the volume of Pacific mackerel consumption increased by nearly 100% thanks to the recovery of catch production, and salt-dry products increased by 3.3%.

Per capita seafood consumption in Japan has halved since the early 2000s, reflecting rising raw material costs, climate impacts, and changing eating habits. This trend is forecast to continue to put pressure on the industry in the coming time, requiring sustainable development solutions.

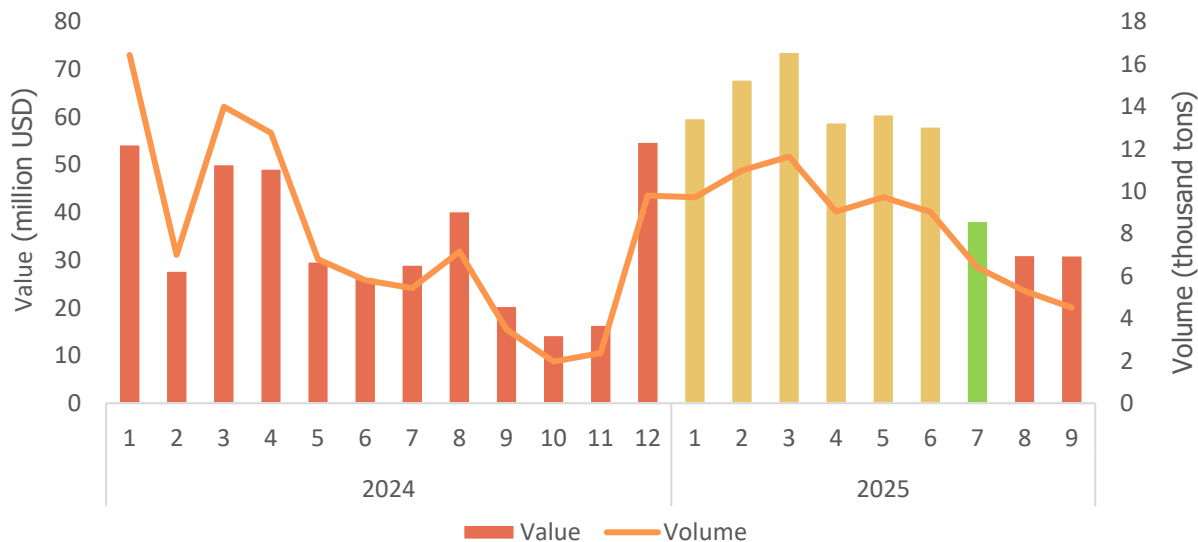
Source: Vasep



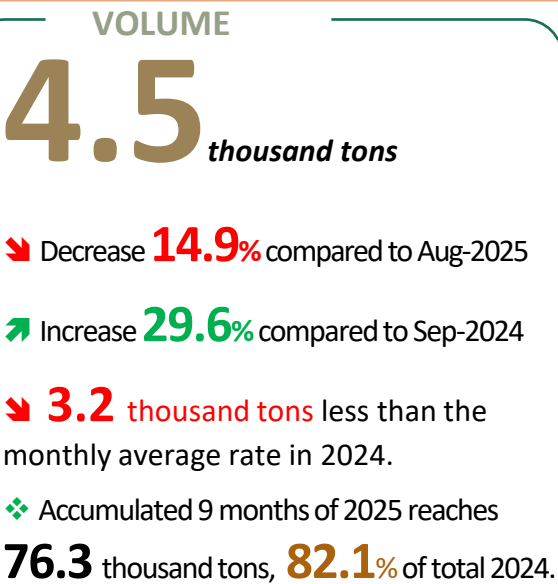
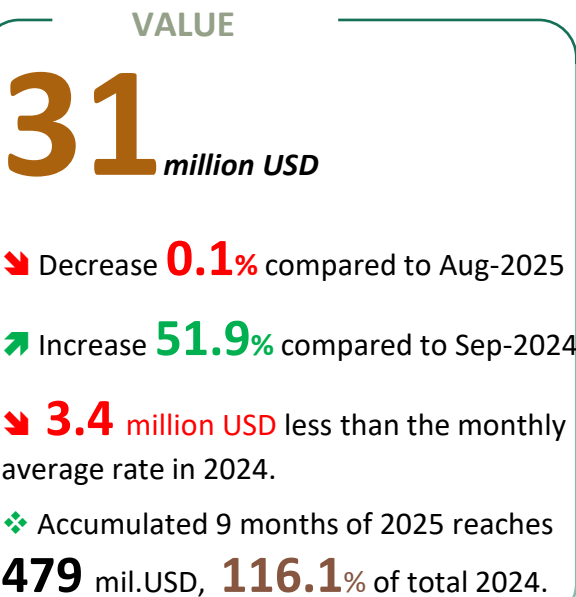


COFFEE

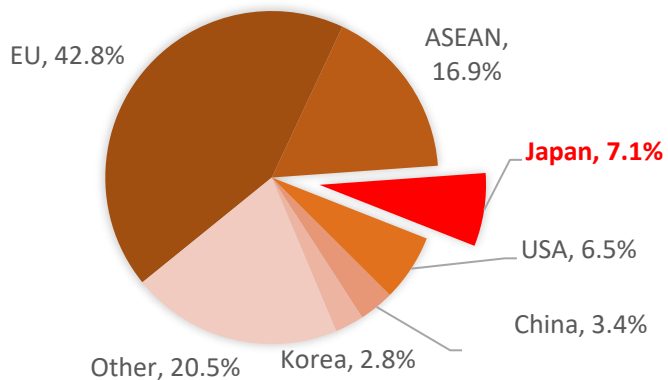
Export value and volume to Japan, Sep-2025



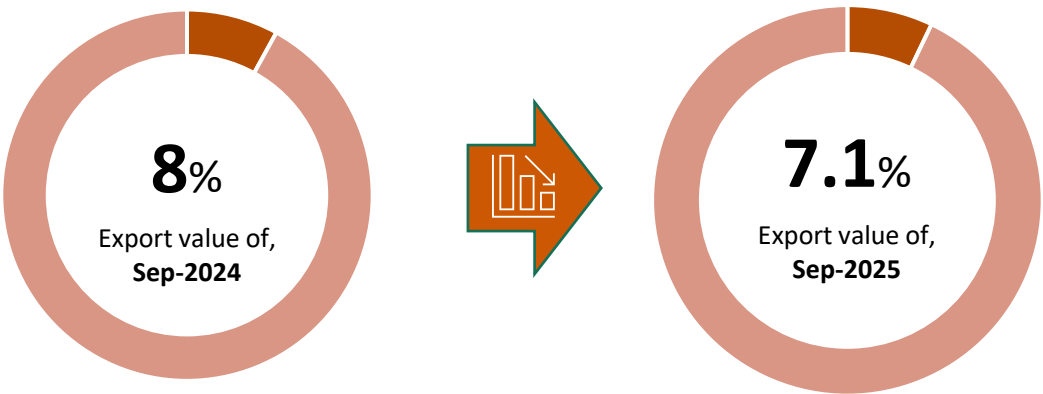
Export results to sang Japan, Sep-2025



Percentage of export results to Japan, Sep-2025



Changes in percentage of export results to Japan, Sep-2025

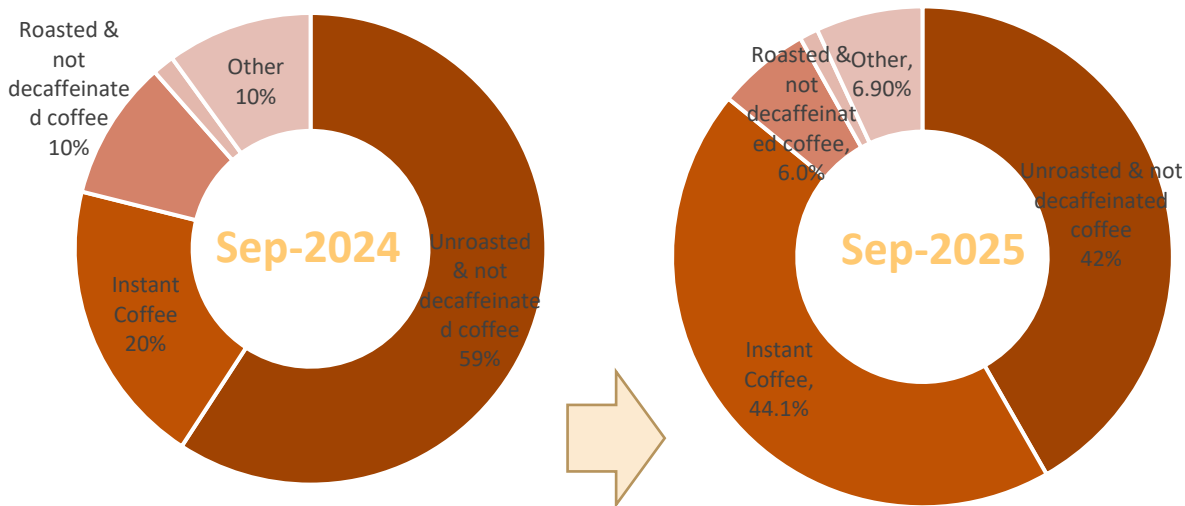


Source: Calculated from data of the General Department of Customs

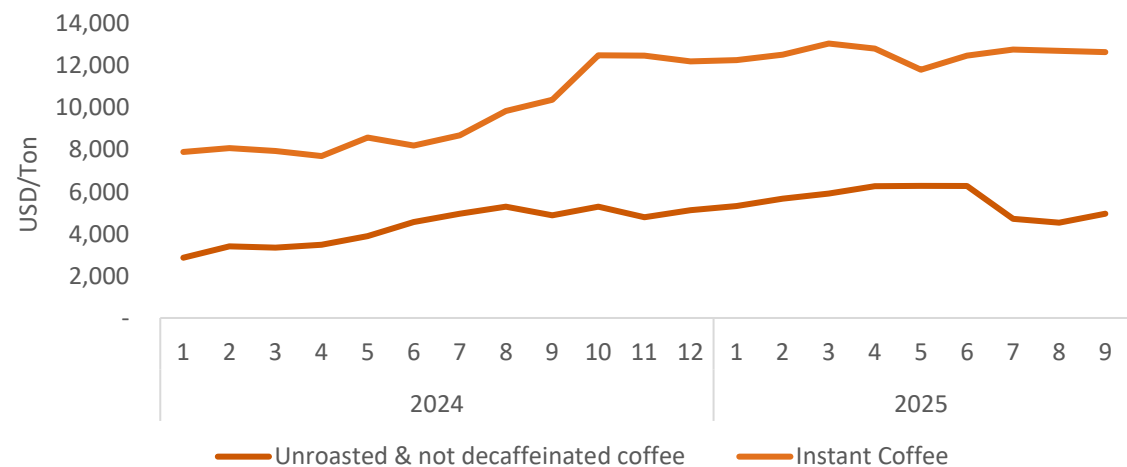


COFFEE

Structure of exports by products to Japan, Sep-2025



Average export coffee price to Japan, Sep-2025



Source: Calculated from data of the General Department of Customs

Export results to Japan, Sep-2025



Unroasted and decaffeinated coffee

Value: **12.9** million USD
Decrease **23.6%** compared to Aug-2025
Increase **7.1%** compared to Sep-2024



Instant Coffee

Value: **13.7** million USD
Increase **47.6%** so compared to Aug-2025
Increase **240%** compared to Sep-2024



Decaffeinated Roasted Coffee

Value: **1.9** million USD
Decrease **13.8%** compared to Aug-2025
Decrease **4.8%** compared to Sep-2024

Instant Coffee

The average export price in Sep-2025 is **12,640** USD/ton, decrease **0.5%** compared to previous month; and increase **21.8%** compared to the same month of 2024.

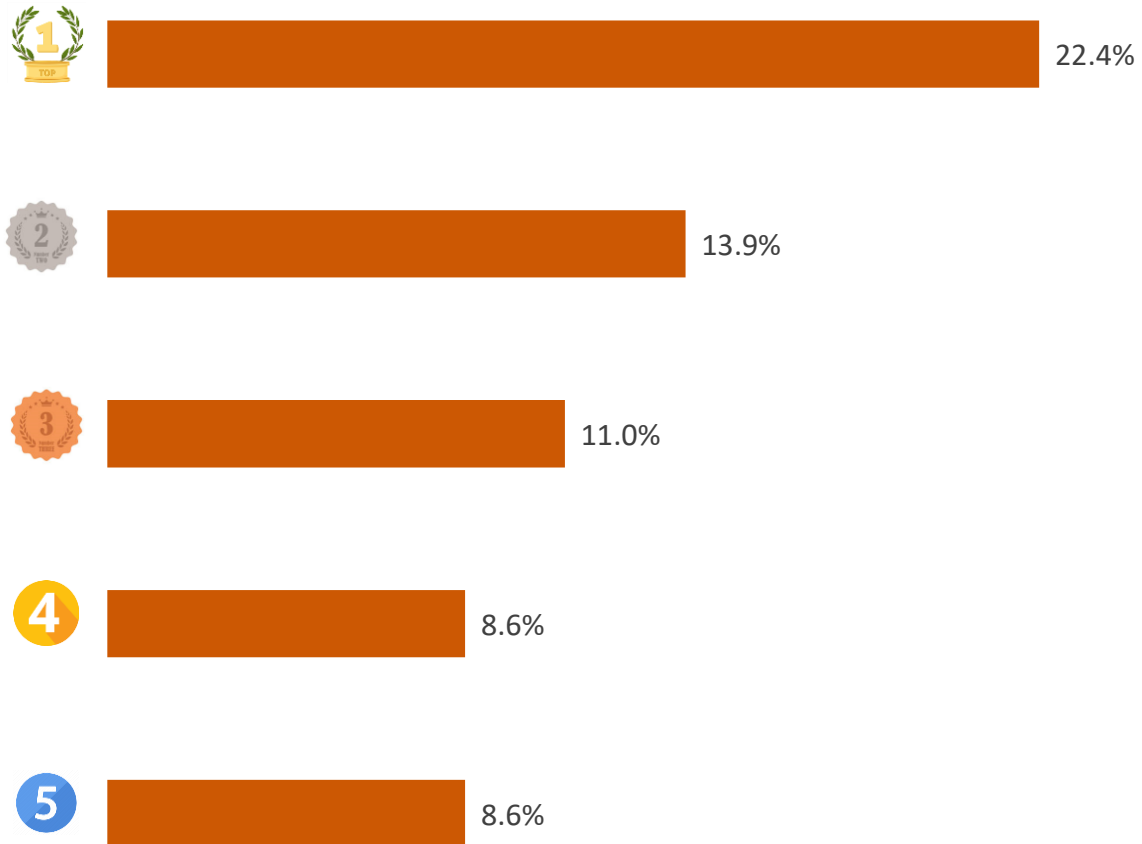
Unroasted and decaffeinated coffee

The average export price in Sep-2025 is **4,956** USD/ton; increase **9.3%** compared to previous month; and increase **1.7%** compared to the same month of 2024.

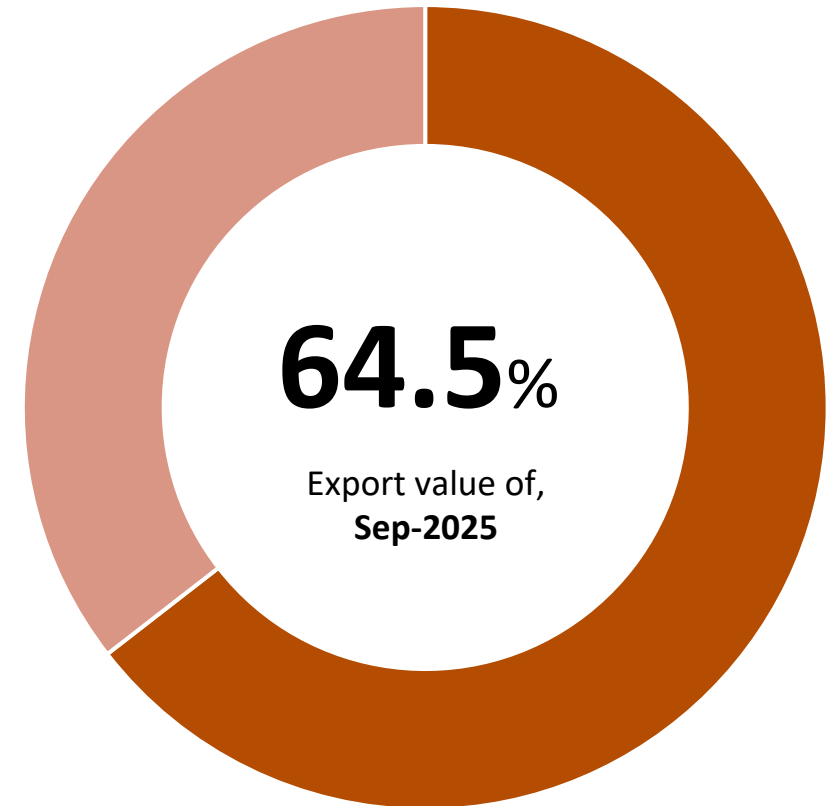


COFFEE

TOP 5 doanh nghiệp về VALUE XK sang Japan, Sep-2025



Value ratio of TOP 5 export enterprises to Japan, Sep-2025





According to statistics from the International Trade Center (ITC), in the first 8 months of 2025, Japan's coffee imports is 250.7 thousand tons, worth 1.71 billion USD, down 4.4% in volume, but up 50.0% in value over the same period in 2024.

In the first 8 months of 2025, the average price of coffee imports to Japan will reach 6,831 USD/ton, up 57.0% over the same period in 2024. The average price of Japan's coffee imports from major markets increased over the same period in 2024. In particular, the average import price of Japanese coffee from Vietnam increased by 62.3% over the same period in 2024, to 5,738 USD/ton.

In the first 8 months of 2025, Japan imports coffee from 59 countries and territories around the world. In particular, Japan increased coffee imports from Brazil, but imports from Vietnam, Ethiopia....

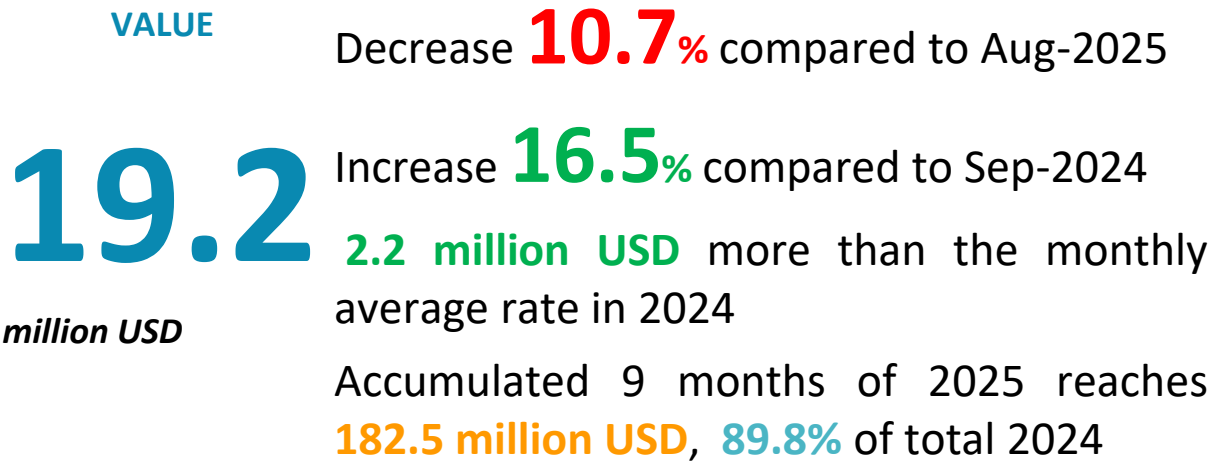


FRUITS & VEGETABLES (EXPORT)

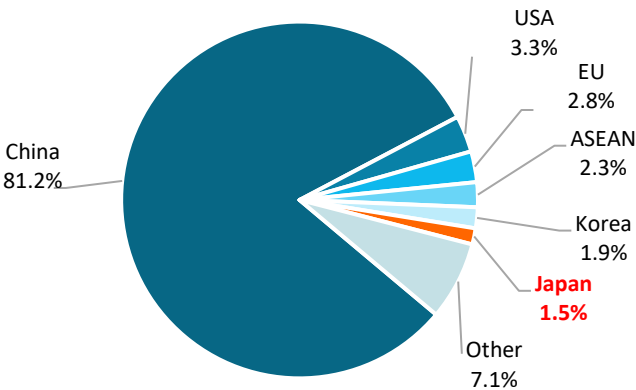
Export value to Japan, Sep-2025



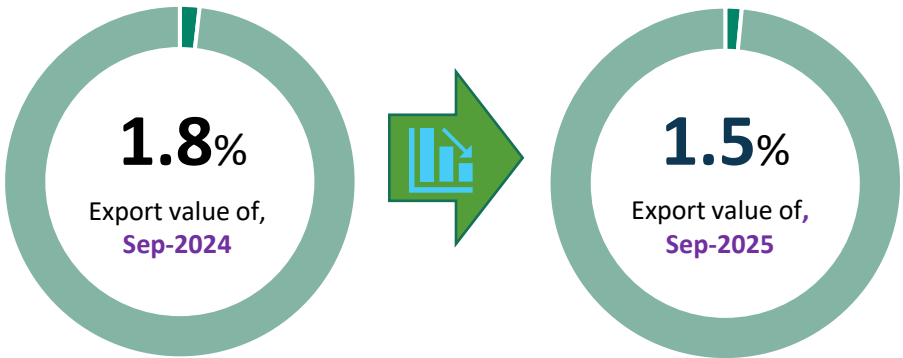
Export results to Japan, Sep-2025



Percentage of export results to Japan, Sep-2025



Changes in percentage of export results to Japan, Sep-2025

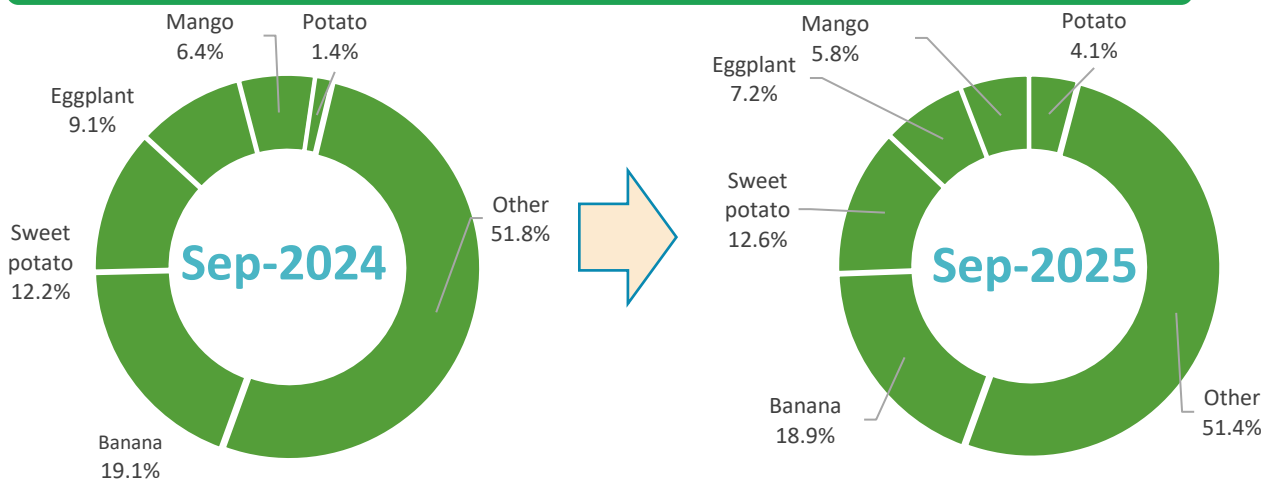


Source: Calculated from data of the General Department of Customs



FRUITS & VEGETABLES (EXPORT)

Structure of exports by products to Japan, Sep-2025



Sweet potato

Value: **2.4** million USD

Decrease **8.0%** compared to Aug-2025

Increase **19.9%** compared to Sep-2024



Eggplant

Value: **1.4** million USD

Decrease **36.1%** compared to Aug-2025

Decrease **8.4%** so compared to Sep-2024

Export results to Japan, Sep-2025



Banana

Value: **3.6** million USD

Decrease **3.5%** compared to Aug-2025

Increase **15,3%** compared to Sep-2024



Mango

Value: **1.1** million USD

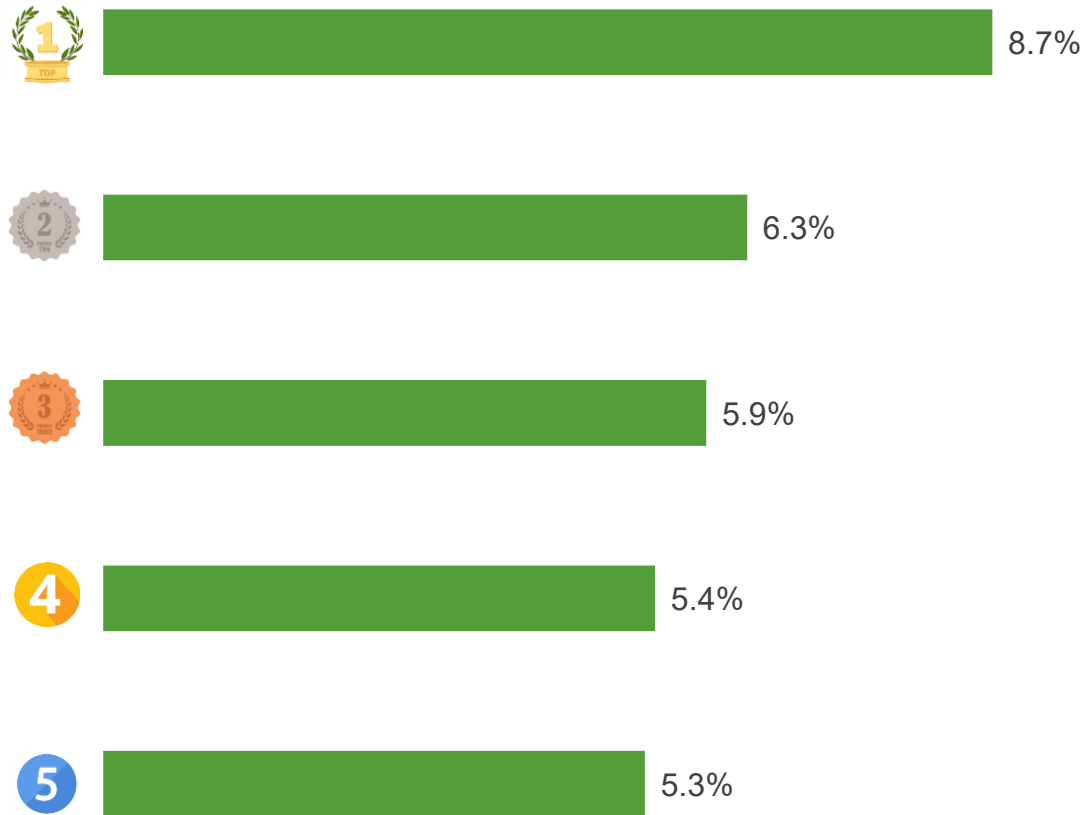
Decrease **28.3%** compared to Aug-2025

Increase **6.7%** compared to Sep-2024

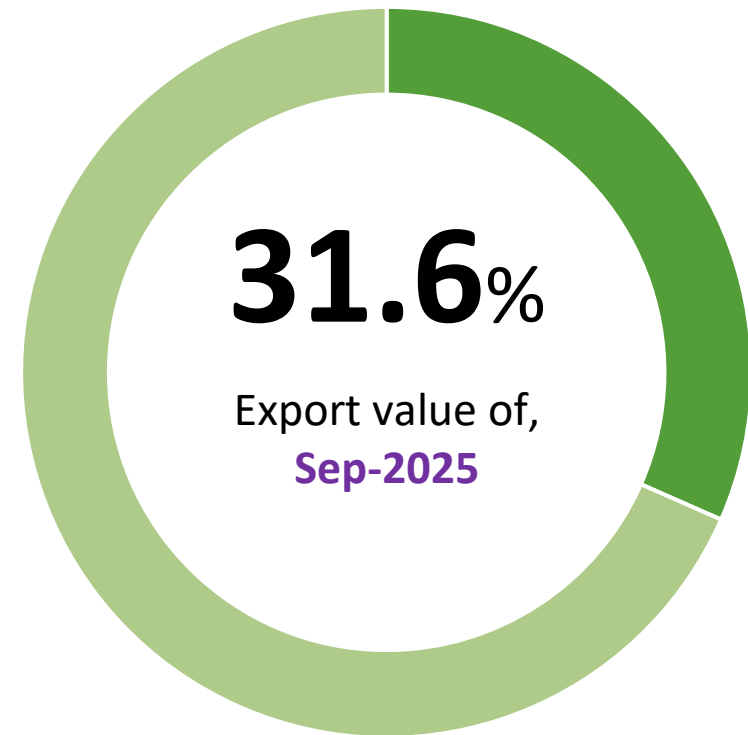


FRUITS & VEGETABLES (EXPORT)

TOP 5 export enterprises by value to Japan, Sep-2025



Value ratio of TOP 5 export enterprises to Japan, Sep-2025



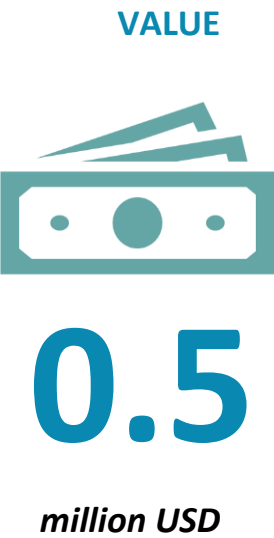


FRUITS AND VEGETABLES (IMPORT)

Import value from Japan, Sep-2025



Import results from Japan, Sep-2025



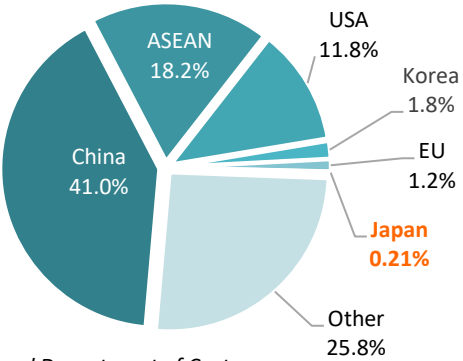
Increase **69.7%** compared to Aug-2025

Decrease **26.1%** compared to Sep-2024

68.4 thousand USD less the monthly average rate in 2024

Accumulated 9 months of 2025 reaches **3.7 million USD**, **54.5%** of total 2024

Percentage of import results from Japan, Sep-2025



Changes in percentage of import results from Japan, Sep-2025



Source: Calculated from data of the General Department of Customs

Fruits and vegetables

SPOTLIGHTS



Trademark protection for the Japan's famous Amaou strawberries

Fukuoka Prefecture is implementing trademark protection measures for the famous Amaou strawberry variety after the breeder's rights expired in January 2025, ending more than 20 years of exclusive control over seeds and seedlings.

This expiration allows anyone to grow the Amaou variety, raising concerns about the risk of deterioration in quality and brand reputation if production is rampant outside the region.

In response, the Fukuoka government and the Zen-Noh agricultural cooperative have turned to trademark protection as the main defense measure. Accordingly, only farmers who are licensed and committed to growing Amaou in Fukuoka Prefecture are allowed to use this trademark. At the same time, the province is also registering trademarks abroad and monitoring online sales to prevent the illegal distribution of seedlings.

Source: Fructidor.com





PEPPER

Export value and volume to Japan, Sep-2025



Export results to Japan, Sep-2025

VALUE
1.7 million USD



Decrease **41.7%** compared to Aug-2025

Decrease **7%** compared to Sep-2024

119.5 million USD less than the monthly average rate in 2024

❖ Accumulated 9 months of 2025 reaches **19.97** mil.USD, **93%** of total 2024

VOLUME
268 tons



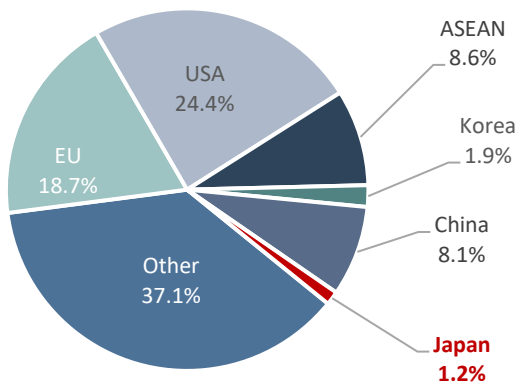
Decrease **39%** compared to Aug-2025

Decrease **23%** compared to Sep-2024

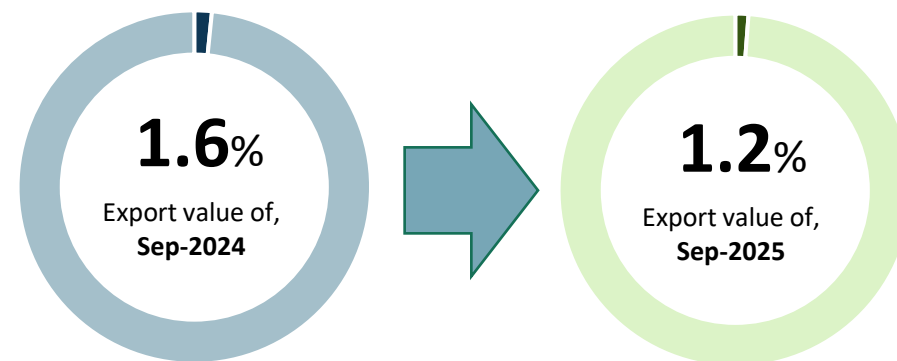
114 tons less than the monthly average rate in 2024

❖ Accumulated 9 months of 2025 reaches **3.3** thousand tons, **72%** of total 2024

Percentage of export results to Japan, Sep-2025



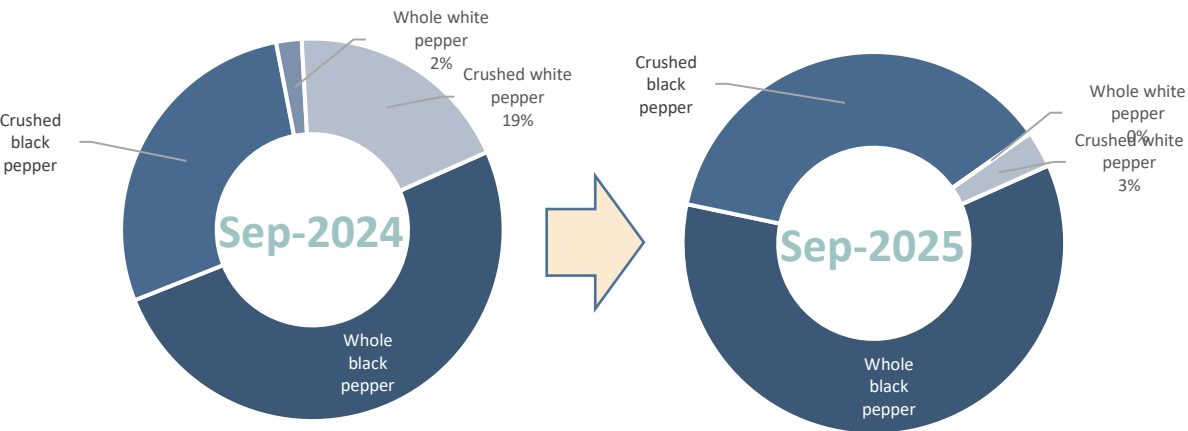
Changes in percentage of export results to Japan, Sep-2025



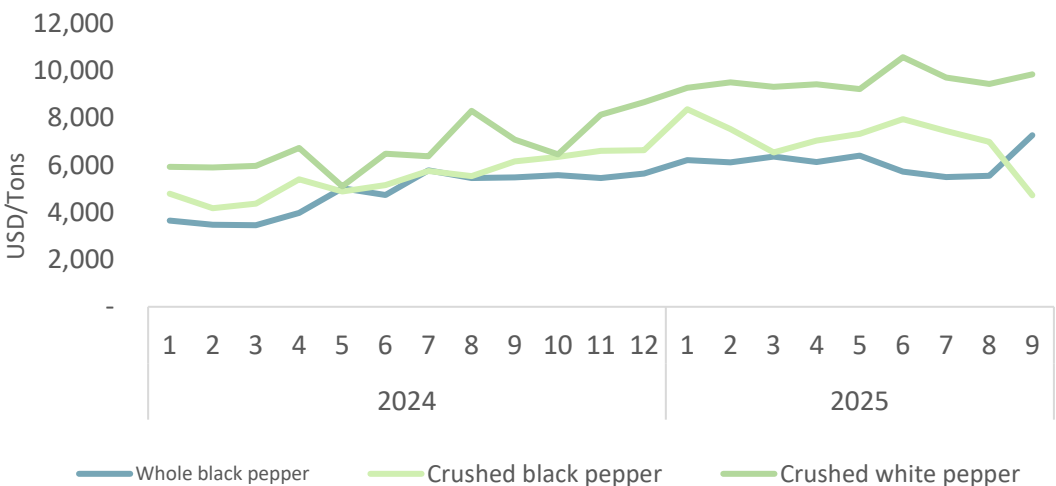


PEPPER

Structure of exports by products to Japan, Sep-2025



Average export pepper price to Japan, Sep-2025



Export results to Japan, Sep-2025



Whole black pepper

Value: **0.615** million USD

Decrease **57%** compared to Aug-2025

Increase **23%** compared to Sep-2024



Crushed black pepper

Value: **0.999** million USD

Decrease **21%** compared to Aug-2025

Increase **10%** compared to Sep-2024

Crushed black pepper

The average export price in Sep-2025 is **7,262** USD/ton; **decrease 6.2%** compared to previous month; and **increase 19.7%** compared to the same month of 2024.

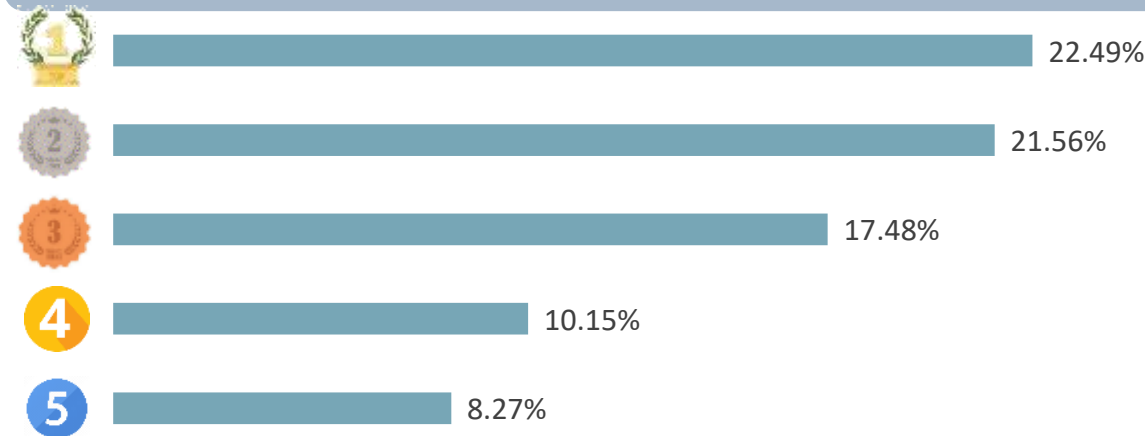
Whole black pepper

The average export price in Sep-2025 is **6,982** USD/ton; **decrease 12.6%** compared to previous month; and **increase 31.9%** compared to the same month of 2024.

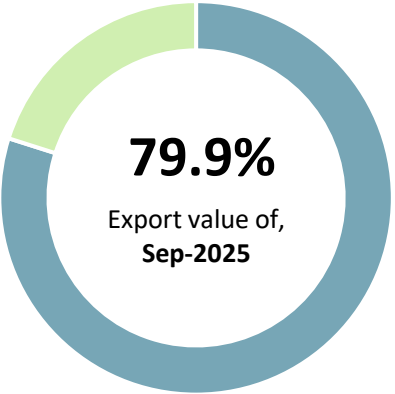


PEPPER

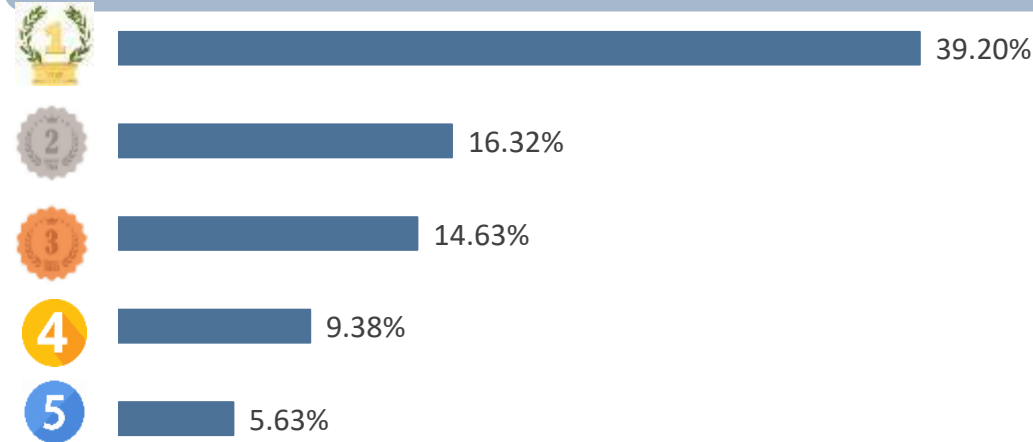
TOP 5 export enterprises by value to Japan, Sep-2025



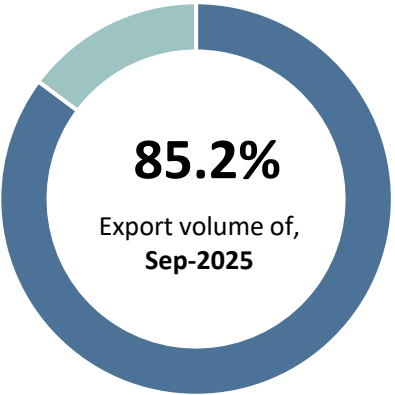
Value ratio of TOP 5 export enterprises to Japan, Sep-2025



TOP 5 export enterprises by volume to Japan, Sep-2025



Volume ratio of TOP 5 export enterprises to Japan, Sep-2025



Source: Calculated from data of the General Department of Customs



MEAT AND MEAT PRODUCTS (EXPORT)

Export value to Japan, Sep-2025



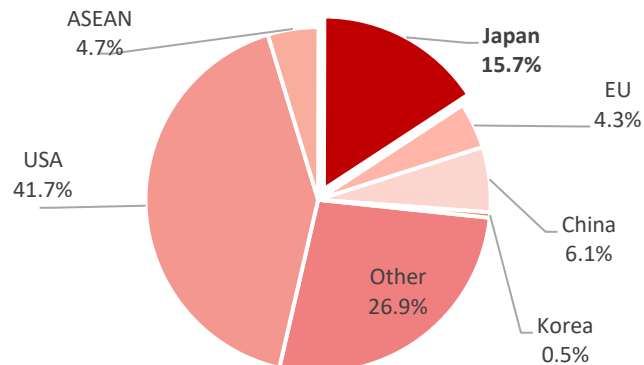
Export results to Japan, Sep-2025



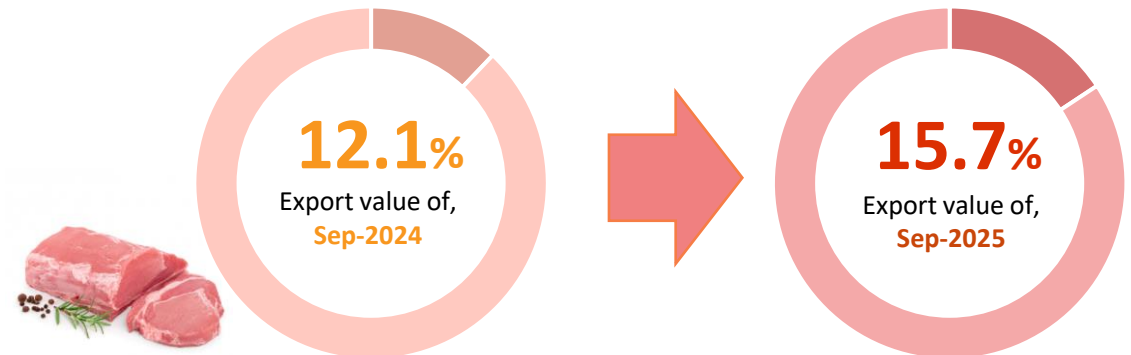
4.05
million USD

- VALUE**
- Decrease **12.7%** compared to Aug-2025
 - Increase **58.8%** compared to Sep-2024
 - Increase **1.18 million USD** more than the monthly average rate in 2024
 - Accumulated 9 months of 2025 reaches **39.4 million USD**, **114.6%** of total 2024

Percentage of export results to Japan, Sep-2025



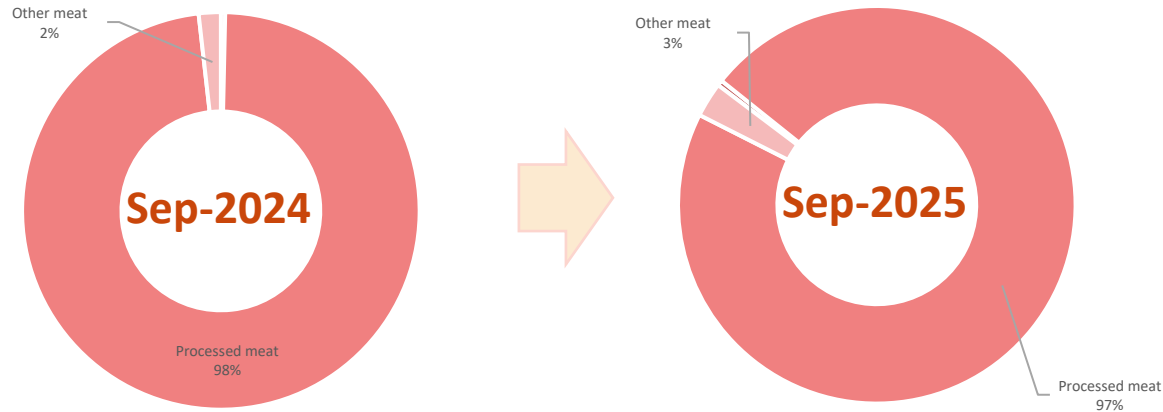
Changes in percentage of export results to Japan, Sep-2025





MEAT AND MEAT PRODUCTS (EXPORT)

Structure of exports by products to Japan, Sep-2025



Export results to Japan, Sep-2025



Processed meat

Value: **3.92** million USD

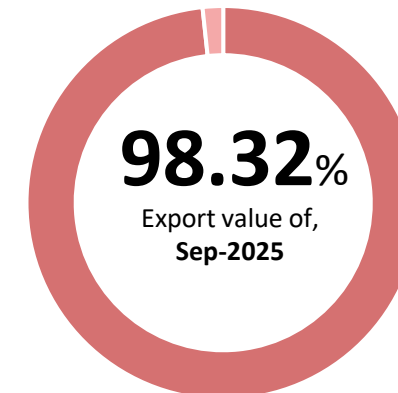
Decrease **13.2%** compared to Aug-2025

Increase **57%** compared to Sep-2024

TOP 5 export enterprises by value to Japan, Sep-2025



Value ratio of TOP 5 export enterprises to Japan, Sep-2025





Any comments. please send to:

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